

Working with list pages

For RiskMan Version 18.07

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Introduction

Every record list page that you have permission to view in RiskMan can be configured to suit your requirements. Further to this, each record list page can be configured *individually*, meaning that for example if you can see the

- Entered Incidents page,
- Incident Inbox page, and
- Posted Incidents page

...you can set each one up with its own unique configuration.

You are able to:

- Change the columns being displayed, their widths, and the order in which they appear
- Change the number of rows shown per page
- Change the way the list is sorted, grouped, and filtered
- Save the way you've configured the page as a "View", and switch between your personally configured views
- Export the resulting list page to a Microsoft Excel file if you wish

This guide also explains list page functionality which is based on user permissions, so you might not have permission to some of these functions (it depends on your level of access). These include:

- Ability to generate a "Letter", based on an existing record in a register
- Ability to clone or update a record
- Ability to reassign ownership of a record

Note

This information in this guide applies to any register, however we have used an Incident register in the screenshots as it is the most universal register.

List page basics

Here's an explanation of the common functions on your list pages:

The screenshot shows the 'INBOX - Incidents for Review' page. At the top, there's a navigation bar with 'My Workspace', 'Management', 'Administration', 'Reports', 'Help', 'Log Out', and 'Feedback Module'. The user is identified as 'System Manager (Manager)'. A toolbar at the top right contains icons for settings, calendar, and other functions. The main area displays a table of incident records with columns: Dist, ID, Group, Incident Date, Incident Involved, Facility, Location, Outcome, and Summary. A toolbar above the table allows for column reordering. At the bottom, there's a pagination control showing '54 Records Found (Page 1 of 4)' and 'Items per page: 15'.

- 1 You cannot modify these columns; they will always be displayed as-is.
- 2 Columns that you can change: Column order, widths, show/hide, etc
- 3 Pagination info: Total records and page count
- 4 Pagination: Change the number of rows showing per page; navigate to first / previous / next / last page
- 5 Toolbar: When you select a record, the available functions/options for working with that record appear here
- 6 Toolbar: Options for configuring and working with your list page overall

The fixed columns: Explanation

- 1 "Administrative" status of the record. Click the icon for more information.
- 2 Your personal viewing status of the record. **Green**: You've never opened it. **Grey**: You have opened it. **Red**: Since you last opened it, someone else has modified it. Also, click the icon to open the Review History of the record.
- 3 The paperclip tells you there is at least 1 document attached to the record
- 4 Dist is short for Distribution List. Usually it will say None. In this example, there is a number – 1 – in one of the rows. This represents the number of users who have been put on the Distribution List for that record *who have not yet viewed it*. This column is also a shortcut – click it to distribute the record to other users.
- 5 Record selection check box: Tick the box to select a record, and the options in the toolbar will appear.
- 6 ID number: Click on the record's ID number to open it. Note that you do not need to check the record's selection box before clicking the ID number!

1	2	3	4	5	6
		Dist	<input type="checkbox"/>	ID	
					<input type="text"/>
		None	<input type="checkbox"/>	3389	
		None	<input type="checkbox"/>	3474	
		None	<input type="checkbox"/>	3480	
		1	<input type="checkbox"/>	3481	
		None	<input type="checkbox"/>	3493	

Modifying your list page

Changing the columns shown on your page

Essentials

Click the **Change Columns** icon in the toolbar.



The Change Columns dialog is shown. Highlighted at the top of the list are the columns currently being displayed on your list page:

Change Columns 5

Cancel Save

This page allows you to choose which columns of information you would like to see on your Incidents page. ?

Display 'Advanced' Columns

#	Field Label	Sort Order
1	3	4
<input checked="" type="checkbox"/>	Incident Date	1
<input checked="" type="checkbox"/>	Incident Involved	4
<input checked="" type="checkbox"/>	Location	5
<input checked="" type="checkbox"/>	Summary	6
<input checked="" type="checkbox"/>	Outcome	7
<input checked="" type="checkbox"/>	Facility	9999
<input type="checkbox"/>	24 Hrs prior to Patient in	9999
<input type="checkbox"/>	A.C.D. Completed After MET	9999
<input type="checkbox"/>	A.C.D. Prior	9999
<input type="checkbox"/>	A.C.D. Suggested	9999
<input type="checkbox"/>	Activity At The Time	9999
<input type="checkbox"/>	Acute Illness	9999

2

- 1 Uncheck to remove column
- 2 Scroll through the list of fields and check each one you want to display as a column on your list page
- 3 Can't find what you're after? Start typing a field name here to search the list
- 4 Set the default order of your columns. This is useful when ever you clear a view in your list page, it will assume the order you have set. 9999 is set to alphabetical order
- 5 Click the **Save** button once you're done. Your list page will refresh, and the columns you selected will be displayed.

Extras

Field Label

Incident Date

Incident Affected

Location

You can edit the **Field Label** if you like. You might do this to abbreviate a long field name. Your changes are only visible on this list page, and they will not affect any other part of the system.

Change Columns

Change Columns Cancel Save

This page allows you to choose which columns of information you would like to see on your Incidents page. Display 'Advanced' Columns

#	Field Label	Sort Order	Field Name	Field Type
<input checked="" type="checkbox"/>	Incident Date	1	IncidentDate	Incident
<input checked="" type="checkbox"/>	Incident Involved	4	IncidentInvolved	Incident
<input checked="" type="checkbox"/>	Location	5	Incident_Location	Incident
<input checked="" type="checkbox"/>	Summary	6	Description	Incident
<input checked="" type="checkbox"/>	Outcome	7	Outcome	Incident
<input checked="" type="checkbox"/>	Facility	9999	Site	Incident

Check the **Display 'Advanced' Columns** box to show additional information for each field. You might need to use this option to differentiate between several fields from your register that have the same label; in which case, you could determine which is which by referring to the **Field Name** column, which contains the unique name of that field in the database.

Change the order of your columns

Simply click and drag a column header to a new spot to rearrange your columns. When you see the two white arrows, you can release your mouse button. The system remembers your changes as you go.

1

Incident Involved	Facility	Location	Outcome	Su
Patient/Client	Eucalyptus Lodge	Centre Block 7th Floor	ISR 2 HIGH	Fel
Staff Member	Eucalyptus Lodge	Cafeteria	ISR 4 MINOR	Sp
Intervention	Acacia Private	Dayton	ISR 4 MINOR	Pt
Client	Eucalyptus Lodge	Community Health Centre	ISR 1 SEVERE	Cli
Client	Acacia Private	Centre Block 4th Floor	ISR 3 MEDIUM	Pt
Client	Acacia Private	Day procedure unit	ISR 3 MEDIUM	SP

2

Incident Involved	Facility	Location	Outcome	Su
Patient/Client	Eucalyptus Lodge	Centre Block 7th Floor	ISR 2 HIGH	Fe
Staff Member	Eucalyptus Lodge	Cafeteria	ISR 4 MINOR	Sp
Intervention	Acacia Private	Dayton	ISR 4 MINOR	Pt
Client	Eucalyptus Lodge	Community Health Centre	ISR 1 SEVERE	Cli
Client	Acacia Private	Centre Block 4th Floor	ISR 3 MEDIUM	Pt
Client	Acacia Private	Day procedure unit	ISR 3 MEDIUM	SP

3

Incident Inv	Outcome	Facility	Location	Outcome	Su
Patient/Client	ISR 2 HIGH	Eucalyptus Lodge	Centre Block 7th Floor	ISR 2 HIGH	Fel
Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Cafeteria	ISR 4 MINOR	Sp
Intervention	ISR 4 MINOR	Acacia Private	Dayton	ISR 4 MINOR	Pt
Client	ISR 1 SEVERE	Eucalyptus Lodge	Community Health Centre	ISR 1 SEVERE	Cli
Client	ISR 3 MEDIUM	Acacia Private	Centre Block 4th Floor	ISR 3 MEDIUM	Pt
Client	ISR 3 MEDIUM	Acacia Private	Day procedure unit	ISR 3 MEDIUM	SP

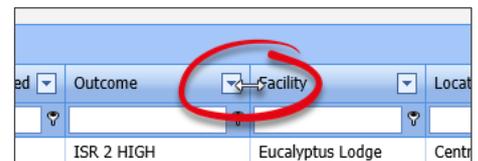
4

Incident Involved	Outcome	Facility	Location	Su
Patient/Client	ISR 2 HIGH	Eucalyptus Lodge	Centre Block 7th Floor	Fe
Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Cafeteria	Sp
Intervention	ISR 4 MINOR	Acacia Private	Dayton	Pt
Client	ISR 1 SEVERE	Eucalyptus Lodge	Community Health Centre	Cli
Client	ISR 3 MEDIUM	Acacia Private	Centre Block 4th Floor	Pt
Client	ISR 3 MEDIUM	Acacia Private	Day procedure unit	SP

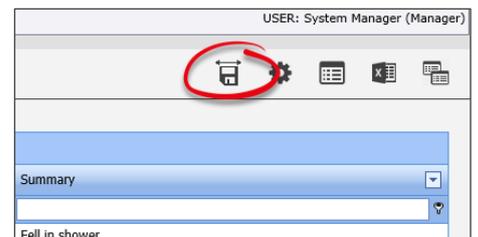
Adjust the widths of your columns

Once you have your columns in their desired order, you can adjust their widths to make the best use of the space available on your screen. We recommend adjusting them from left to right.

Put your mouse cursor on the line that separates each column. Click and drag left to right to adjust as needed.



Once you have adjusted all the column widths as desired, click the save icon  in the toolbar to save your changes.



Note that the save icon only appears in the toolbar *after* you've started adjusting the width of your first column.

Sort your list

Click on a column heading to sort your records by values in that column.

The arrow represents whether you are sorting in ascending or descending order.

The column you sort by will always be remembered on this list page.

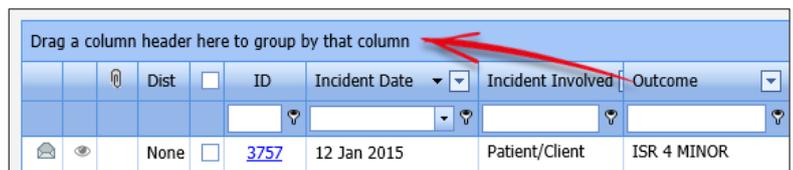
ID	Incident Date	Incident Involved
3757	12 Jan 2015	Patient/Client
3752	9 Dec 2014	Patient/Client
3742	28 Nov 2014	Patient/Client
3735	28 Nov 2014	Patient/Client

Group the records on your list page

Group the records based on one of the columns showing in your list. In this example we've grouped our incidents by their severity rating:

INBOX - Incidents for Review									
New Incidents and edits of Incidents									
Outcome ▾									
	Dist	ID	Incident Date	Incident Involved	Facility	Group	Location	Summary	
Outcome: ISR 1 SEVERE									
	None	3481	23 Jun 2012	Client	Eucalyptus Lodge	Master	Community Health Centre	Client became aggressive during n	
Outcome: ISR 2 HIGH									
	None	3537	5 Aug 2012	Client	Acacia Private		Centre Block 4th Floor	Client became aggressive during t	
	None	3667	1 Aug 2012	Patient/Client	Acacia Private		Centre Block 2nd Floor	Pt fell from bed and fractured fem	
	None	3389	1 Jun 2012	Patient/Client	Eucalyptus Lodge		Centre Block 7th Floor	Fell in shower	
	1	3572	3 Feb 2011	Client	Acacia Private		Centre Block 7th Floor	ABO Blood Incompatibly during tra	
Outcome: ISR 3 MEDIUM									
	None	3752	9 Dec 2014	Patient/Client	Acacia Private		ACAS	Gonna make a few changes	
	None	3742	28 Nov 2014	Patient/Client	Acacia Private	Master	Cafeteria	Stained a red dress	
	None	3704	12 Mar 2013	Patient/Client	Acacia Private		Centre Block 5th Floor	Resident fall in home on lino floor	
	None	3545	15 Sep 2012	Client	Acacia Private		Centre Block 7th Floor	Pressure wound degrading to Grad	
	None	3497	25 Feb 2012	Client	Acacia Private		Day procedure unit	SPECIMEN LOST AFTER COLLECT	

In order to group your records, click and drag the column header to the space above the list which says **Drag a column header here to group by that column**:



Click and drag a column header to the grouping area. When you see the two white arrows, you can release your mouse button. The system remembers the groupings you have added.

You can add subsequent grouping levels by following the same steps.

To **remove** a level of grouping, simply click and drag the column header back to where you want it to be in the list.

Filter your list

You can apply a filter to one or more of the columns showing on your list page, so that you only see a specific subset of the records in your list. Each column header has a filter box underneath it:

Dist	ID	Group	Incident Date	Incident Involved	Outcome	Facility	Location	Summary
None	3389		1 Jun 2012	Patient/Client	ISR 2 HIGH	Eucalyptus Lodge	Centre Block 7th Floor	Fell in shower
None	3474	3480	3 Feb 2012	Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Cafeteria	Split hot coffee and tomato sauce on clothing, 2nd degree burns.
None	3480	Master	13 Jun 2012	Intervention	ISR 4 MINOR	Acacia Private	Dayton	Pt delivered incorrect dosage instructions on medication..
None	3481	Master	23 Jun 2012	Client	ISR 1 SEVERE	Eucalyptus Lodge	Community Health Ce...	Client became aggressive during meal time...
None	3493		29 Jan 2012	Client	ISR 3 MEDIUM	Acacia Private	Centre Block 4th Floor	Pt administered extra dose of heparin... not happy!
None	3497		25 Feb 2012	Client	ISR 3 MEDIUM	Acacia Private	Day procedure unit	SPECIMEN LOST AFTER COLLECTION

Click the funnel icon to select the type of filter test you want to apply:

Left: Filter tests that can be used against data fields

- Begins with
- Contains
- Doesn't contain
- Ends with
- Equals
- Doesn't equal
- Like ("%", "_")

Right: Filter tests that can be used against date / time / numeric fields

- Equals
- Doesn't equal
- Is less than
- Is less than or equal to
- Is greater than
- Is greater than or equal to

Left: Filter tests that can be used against data fields **Right:** Filter tests that can be used against date / time / numeric fields

Type the desired value and press Enter on your keyboard. Your list will then only display matching records:

Dist	ID	Group	Incident Date	Incident Involved	Outcome	Facility	Location	Summary
None	3474	3480	3 Feb 2012	Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Cafeteria	Split hot coffee and tomato sauce on clothing, 2nd degree burns.
None	3574		3 Feb 2012	Staff Member	ISR 4 MINOR	Acacia Private	Cardiac Rehab	Staff member hurt back lifting patient from bed to chair
None	3590		18 Aug 2011	Staff Member	ISR 3 MEDIUM	Acacia Private	Main Entrance	I was assaulted by a patient outside main entrance when I was coming t...
None	3591		19 Aug 2011	Staff Member	ISR 3 MEDIUM	Acacia Private	Centre Block 2nd Floor	Assault by client in reception
1	3631	Master	3 Feb 2012	Staff Member	ISR 3 MEDIUM	Acacia Private	Centre Block 3rd Floor	Became aggressive towards a staff member
1	3697	3696	7 Jan 2013	Staff Member	ISR 4 MINOR	Acacia Private	Ward 1F	Fell over
None	3711		22 Sep 2014	Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Applicances	stuff stuff stuff

To remove a filter, click into the filter box, delete your filter criteria, and press the Enter key on your keyboard.

To remove all filters at once, click the **Clear Filter** icon in the toolbar:

INBOX - Incidents for Review
New Incidents and edits of Incidents

Select a record to display the available tools.

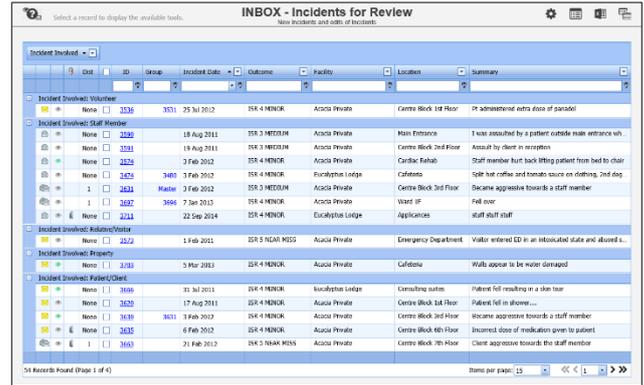
Drag a column header here to group by that column

Dist	ID	Group	Incident Date	Incident Involved	Outcome	Facility	Location
None	3474	3480	3 Feb 2012	Staff Member	ISR 4 MINOR	Eucalyptus Lodge	Cafete
None	3574		3 Feb 2012	Staff Member	ISR 4 MINOR	Acacia Private	Cardia
None	3590		18 Aug 2011	Staff Member	ISR 3 MEDIUM	Acacia Private	Main E

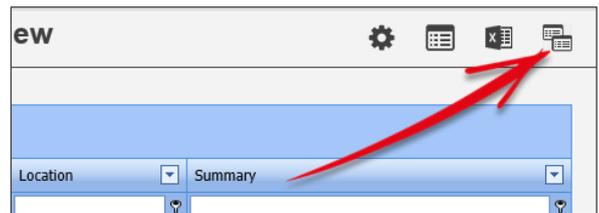
Save the way you have configured your list as a “View”

Once you have setup the columns you want, and applied sorting, filtering, or grouping to your list, you can then save that configuration as what is called a **View**. You can have multiple saved views that you can switch between with the click of your mouse.

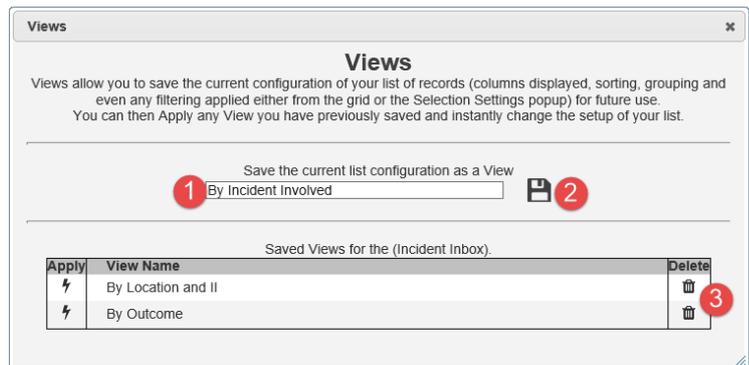
In this example, we’ve grouped our records by the Incident Involved field, and we have sorted the records by incident date.



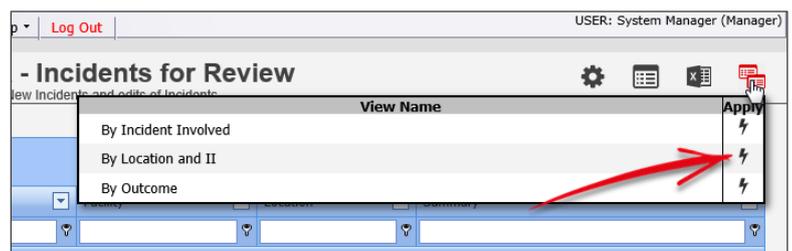
In order to save this as a view, we need to click the **View** icon in the toolbar.



- 1 Type a name for your View.
- 2 Click the **Save** icon. You will be returned to the list page, and a message will be displayed to confirm your view was saved.
- 3 You can delete any of your existing views by clicking the respective **Delete** icon.



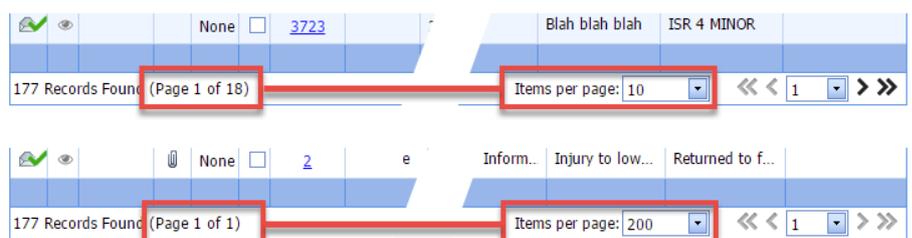
You can now switch between your saved Views by hovering your mouse (do not click) over the **Views** icon, and clicking the **Apply** icon of the View you wish to load.



Export the list page to Excel

You can export the records shown on the current list page by click the Excel icon in the toolbar.

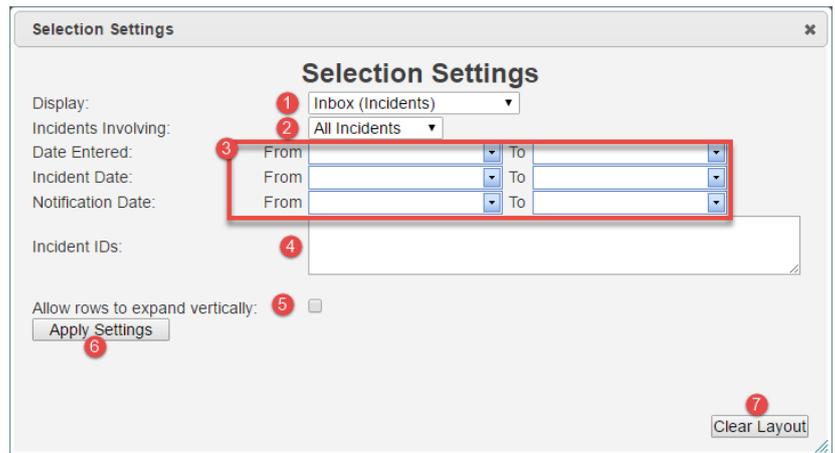
Only the first page is exported, so if you list contains more records than can be displayed on one page because of your pagination settings, simply increase the number of items per page so that they fit on to one page.



Selection Settings

In the toolbar, you'll note the Selection Settings cog icon . It contains the following functionality:

- ❶ Switch between the various record list pages that you have permission to view
- ❷ Restrict the records being shown on your page by record type; in this example by Incident Involved
- ❸ Restrict the records being shown on your page using date filters (the date fields available will vary by register)
- ❹ Restrict the records being shown on your page by specific record ID numbers. Separate multiple ID numbers using a comma, e.g. 51,73,106 etc



- ❺ You set the width of the columns you have chosen to display on your list page. By default, if any individual cell contains more information than can be shown, the information will be truncated, and an ellipsis displayed instead.

Enabling this setting will force the content to be displayed; information in the fields will wrap instead of being truncated.



Left: Setting turned off **Right:** Setting turned on

- ❻ Once you have configured the various settings, click the **Apply Settings** button. Your list page will refresh with your desired settings in place. The settings you apply here will be remembered until you decide to change them.
- ❼ Should you wish to return your list page back to a “default” configuration, click the **Clear Layout** button. This returns your list page to the default settings, including columns displayed, removing all sorting, filtering, and grouping, and clears all of the settings applied in the Selection Settings dialog. Note that any **Views** you have created will not be affected by this action.